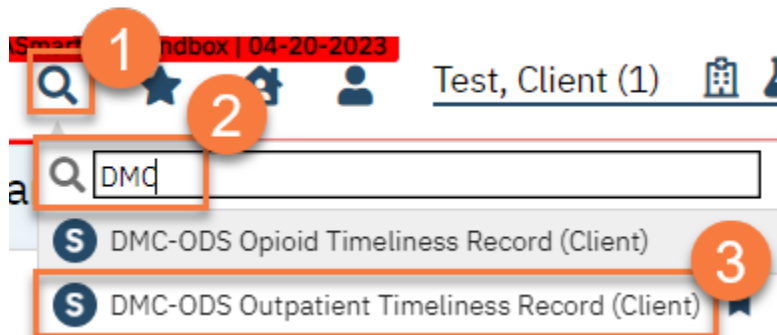


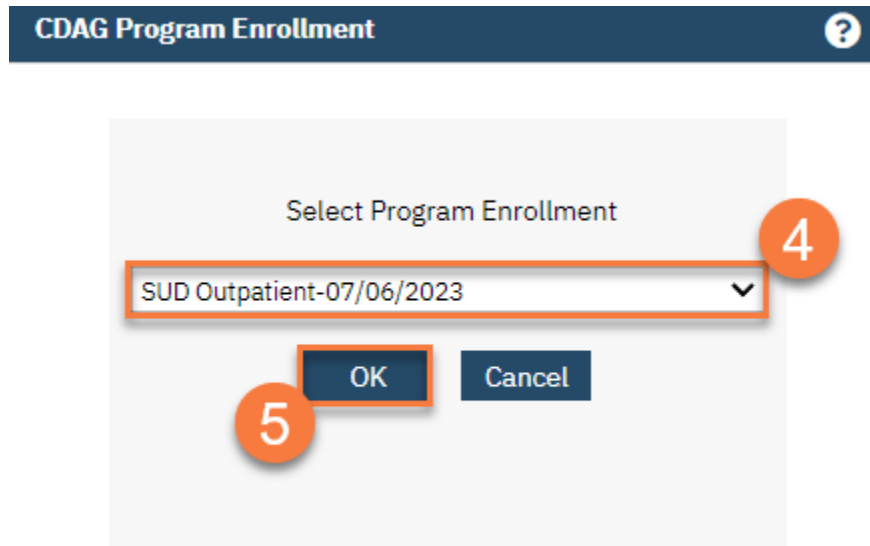
Attachment C

How to Complete the DMC Outpatient Timeliness Record

1. With the client open, click on the **Search** icon.
2. Type in “DMC-ODS Outpatient Timeliness” in the search bar.
3. Select “DMC-ODS Outpatient Timeliness Record (Client)” from the search results.



4. A CDAG window will pop up. **Select the program** you're trying this record to.
5. **Click OK.**



6. This takes you to the DMC-ODS Outpatient Timeliness Record. **Complete the record.** You can save information as you go and come back to it later, if you do not have all the data required.
 - a. **Enter the Referral Source.** This should be the person who referred the client to services. If the client requested services themselves, select “self”.
 - b. **Enter the Date of First Contact.** This is the date when the initial request for services was made.

- c. **Enter the First Service Appointment Offered Date.** This is the first available appointment that was offered to the client, regardless of whether they accepted that appointment or not. For example, if you have an appointment available on Tuesday 1/10/24 at 9am, but the client says they're unavailable on Tuesdays, you will still enter that you *offered* an appointment on 1/10/24 at 9am.
- d. **If the offered appointment is outside of the timeliness range, enter the Reason for Delay.** This may be due to the client requesting a specific service, or a specific provider. If you select "other", enter a description of the reason in the text field indicated.
- e. **Enter the First Service Appointment Rendered Date.** This is the date the client actually had their first appointment. If a client accepts an appointment but doesn't show to that appointment, then a service has not yet been rendered and that date should not be entered here. If the client never actually starts services, leave this field blank and follow the instructions listed below in 7.

The screenshot shows the SmartCare interface for a "DMC-ODS Outpatient Timeliness Record". The form includes the following sections and fields:

- Header:** SmartCare logo, search, home, user, and navigation icons. Breadcrumbs: Test, Client (1).
- Form Header:** Effective date (12/26/2023), Status (New), Author (Rowe, Charla), and a Sign button.
- Section 6:** "DMC-ODS Outpatient Timeliness Record" with a sub-note: "This is only required for Medi-Cal beneficiaries who are making an initial request for outpatient substance use disorder treatment services."
- Section a:** "Initial Request and Appointment"
 - Referral Source: (dropdown menu)
 - Date of First Contact to Request Services: (calendar icon)
- Section c:** "First Service Appointment Offered Date:" (calendar icon)
- Section e:** "First Service Appointment Rendered Date:" (calendar icon)
- Section d:** "Reason for Delay:" (dropdown menu) and "If other, explain:" (text area)
- Section Follow-Up:**
 - Follow Up Appointment NOT Offered: (checkbox)
 - First Follow Up Appointment Offered Date: (calendar icon)
 - First Follow Up Appointment Rendered Date: (calendar icon)
 - Documentation of clinical appropriateness of wait time extension: (text area)
 - Referred to an out-of-network provider: (radio buttons for Yes/No)
 - Details: (text area)

Annotations a-e are placed over the corresponding fields in the form. A large orange circle with the number 6 is placed over the section header. A blue question mark icon is in the bottom right corner.

1.

- f. **If a follow-up appointment was not offered for any reason, click on the Follow-Up Appointment NOT Offered checkbox.** This will grey out the rest of the Follow-Up section.
- g. **If a follow-up appointment is offered, enter the First Follow Up Appointment Offered Date.** This is the first available appointment that was offered to the client after their first rendered service appointment. Much like in step c above, enter the offered date, even if the client did not accept that offered appointment.
- h. **If the follow-up offered appointment is outside of the timeliness range,** the “Documentation of clinical appropriateness” field will become available. **Document the clinical appropriateness of delaying follow-up care,** or indicate where in the client’s record this is documented. For example, if it’s documented in a progress note, you can simply write “see progress note dated 1/10/24”.
- i. **If the follow-up offered appointment is outside of the timeliness range, indicate whether or not the client was referred to an out-of-network provider.** This does not include contract providers who provide SMHS, but rather other agencies and providers who do not contract with the county. If you answer yes, provide the details of the referral.
- j. **Enter the First Follow Up Appointment Rendered Date.** This is the date the client actually had their first follow-up appointment. If a client accepts an appointment but doesn’t show to that appointment, then a service was not rendered and that date should not be entered here. If the client never attends a first follow-up, leave this field blank and follow the instructions listed below in 7.
- k. A record is considered complete when a client has had a first follow-up appointment rendered. At this point **click Sign** to complete the record. You may now close the screen.

SmartCare CalMHSA Smartcare Sandbox | 04-20-2023 Test, Client (1) Charla Rowe

DMC-ODS Outpatient Timeliness Record

Effective: 12/26/2023 Status: New Author: Rowe, Charla Sign

First Service Appointment Offered Date: [] First Service Appointment Rendered Date: []

Reason for Delay: []

If other, explain: []

Follow-Up

f Follow Up Appointment NOT Offered

g First Follow Up Appointment Offered Date: [] j First Follow Up Appointment Rendered Date: []

Documentation of clinical appropriateness of wait time extension: (If documented in a progress note, indicate the date of this progress note "see progress note dated XX/XX/XXXX")

h []

i Referred to an out-of-network provider Yes No

Details: []

Closure

Closure Date: [] Closure Reason: []

If other, explain: []

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7. Sometimes a client does not complete the admission process. **If a client starts the process** (e.g. makes a request for services) **but doesn't complete it** (doesn't attend a follow-up appointment), then you will **close the record without it being complete**.
 - a. In the Closure section, **enter the Closure Date**. This is the date you've determined the client will not complete the admission process.
 - b. **Enter the Closure Reason**. These reasons generally indicate which step in the process the client exited. If you select "other", enter a description of the reason in the text field indicated.
 - c. Once you've completed the closure section, **click Sign** to finalize the record. You may now close the screen.

SmartCare | CalMHSA Smartcare Sandbox | 04-20-2023 | Test, Client (1) | Charla Rowe

DMC-ODS Outpatient Timeliness Record

Effective: 12/26/2023 | Status: New | Author: Rowe, Charla | Sign

First Service Appointment Offered Date: [] | First Service Appointment Rendered Date: []

Reason for Delay: []

If other, explain: []

Follow-Up

Follow Up Appointment NOT Offered

First Follow Up Appointment Offered Date: [] | First Follow Up Appointment Rendered Date: []

Documentation of clinical appropriateness of wait time extension: (If documented in a progress note, indicate the date of this progress note "see progress note dated XX/XX/XXXX")

[]

Referred to an out-of-network provider Yes No

Details: []

Closure

Closure Date: [] | Closure Reason: []

If other, explain: []

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